

U.S. Army 2005 MWR Leisure Needs Survey



**Natick RDE Center
Massachusetts**

CALIBER
an ICF Consulting Company

BRIEFING OUTLINE

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I **LEISURE NEEDS SURVEY**

- Project Overview
- Methodology
- Patron Sample
- Products

I **SURVEY RESULTS**

- MWR Programs and Facilities
- Leisure Activities

I **NEXT STEPS**

PROJECT OVERVIEW

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MWR STRATEGIC BUSINESS PLANNING MODEL

COMPONENTS

Analyzing and forecasting the external environment

Analyzing programs and markets

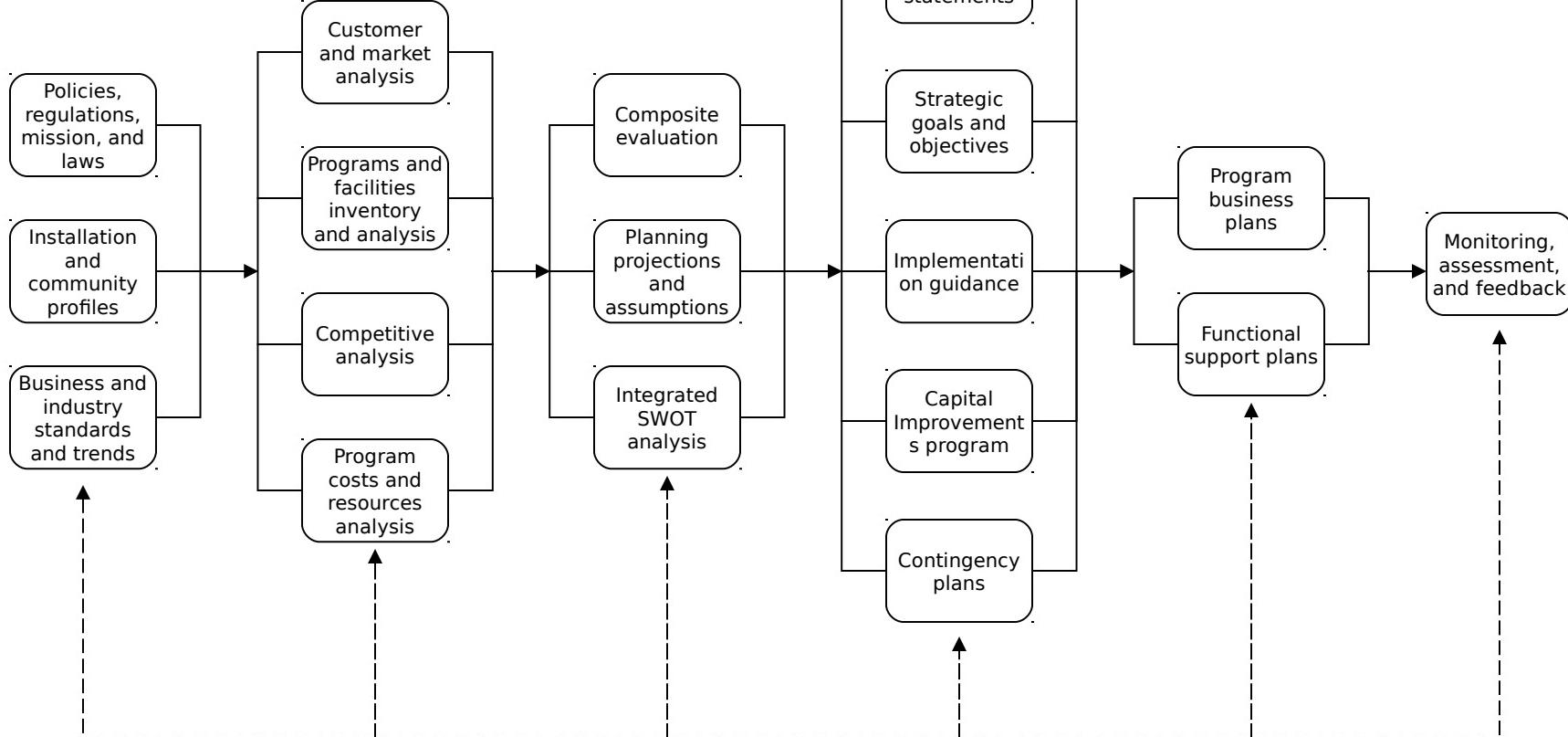
Developing alternatives

Formulating the strategic business plan

Formulating operational business plans

Monitoring and evaluating plan implementation

ELEMENTS



METHODOLOGY

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I PROJECT SCOPE

- 92 sites were surveyed in 2005
 - Northeast (21 sites)
 - Northwest (10 sites)
 - Southeast (13 sites)
 - Southwest (14 sites)
 - Europe (20 sites)
 - Korea (9 sites)
 - Pacific (5 sites)
- 249,555 surveys were distributed throughout the Army to four patron groups:
 - Active Duty Soldiers
 - Spouses of Active Duty Soldiers (CONUS only)
 - DA Civilians
 - Retirees (CONUS only)
- 1,034 surveys were distributed at Natick RDE Center



I SURVEY ADMINISTRATION

- Designed to collect information on installation MWR programs and facilities as well as the leisure activities of your potential market
- 65 multiple choice questions; 7 questions were tailored to your specific installation issues

METHODOLOGY

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□ **SURVEY ADMINISTRATION (Continued)**

- Active Duty and DA Civilian surveys distributed by installation POCs
- Spouses of Active Duty and Retiree surveys direct mailed to home addresses (CONUS only)
- Web survey option offered for the first time to all respondents

METHODOLOGY

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I SURVEY SAMPLE

- Four population segments
 - Active Duty
 - Spouses of Active Duty (CONUS only)
 - Civilian Employees
 - Retirees (CONUS only)
- Response Rates and Confidence Intervals for each patron group and overall sample

	<u>Survey Population</u>	<u>Surveys Distributed</u>	<u>Surveys Returned</u>	<u>Response Rate</u> *	<u>Confidence Interval</u> **
Army:					
Survey Totals	1,212,240	249,555	50,651	20.91%	±.43%
Natick RDE Center:					
Active Duty	27	27	3	11.11%	±53.34%
Spouses of Active Duty	469	46	9	19.57%	±32.35%
Civilian Employees	2,000	829	184	22.20%	±6.88%
Retirees	137	132	37	28.03%	±13.76%
Total	2,633	1,034	233	22.53%	±6.13%

* Response rate is calculated by dividing the number of surveys returned by the number of surveys distributed. It should be noted that low response rates (i.e., less than 20%) increase the chance that one or more subgroups (e.g., for active duty patron group, E1-E4 is a subgroup) may be over- or under-represented. Any patron groups with fewer than 15 survey respondents do not have their data reported to protect privacy and ensure representativeness.

**A confidence interval for a sample mean tells us the range in which we are likely to find the true population mean: Assume 300 surveys were returned for an active duty patron group of 1,350. 52% responded that they used the gym in the last year. The 95% confidence interval for this case would be ±5%. Thus there is a 95% chance that the TOTAL number of active duty at this installation who used the gym last year is between 47% and 57%. We can be 95% confident that between 634 and 770 active duty used the gym.

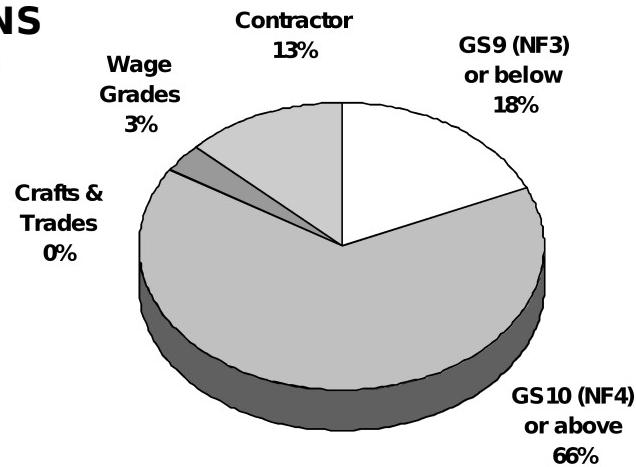
PATRON SAMPLE*

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RESPONDENT POPULATION SEGMENTS

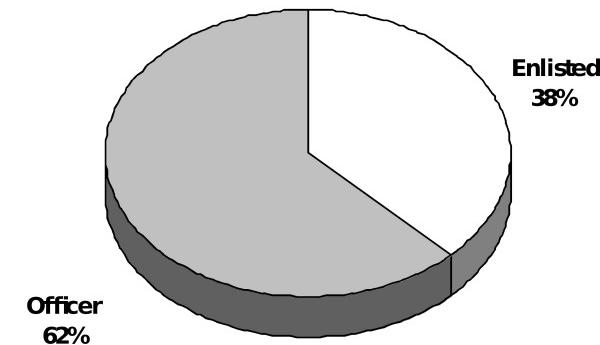
CIVILIANS

(n = 180)



RETIREES

(n = 32)



*The n provided for each patron group is equal to the number of respondents who provided their rank or paygrade.

PRODUCTS

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□ **PRODUCTS**

- Comprehensive installation report of survey data in electronic form
- SPSS data file provided to installation representatives for further analyses, if desired
- Installation level briefing of findings
- IMA and Army level roll-up reports and briefings

□ **PRODUCT DISTRIBUTION**

- All products provided on CD
- CD distribution to installation MWR Directors, IMA Headquarters, and U.S. Army Community and Family Support Center

MWR PROGRAMS & FACILITIES: USAGE AT NATICK RDE CENTER

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MOST FREQUENTLY USED FACILITIES

Post Picnic Area	44%
Recreation/Community Activity Ctr.	36%
Swimming Pool	26%
Athletic Fields	19%
BOSS	1%

LEAST FREQUENTLY USED FACILITIES

BOSS	1%
Athletic Fields	19%
Swimming Pool	26%
Recreation/Community Activity Ctr.	36%
Post Picnic Area	44%

MWR PROGRAMS & FACILITIES: SATISFACTION AT NATICK RDE CENTER*

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FACILITIES WITH HIGHEST SATISFACTION RATINGS*

Swimming Pool	4.52
Post Picnic Area	4.03
Athletic Fields	4.00
Recreation/Community Activity Ctr.	3.52
BOSS	3.00

FACILITIES WITH LOWEST SATISFACTION RATINGS*

BOSS	3.00
Recreation/Community Activity Ctr.	3.52
Athletic Fields	4.00
Post Picnic Area	4.03
Swimming Pool	4.52

*Programs and facilities were rated on a 5 point scale: 5 = Very Satisfied and 1 = Very Dissatisfied

MWR PROGRAMS & FACILITIES: QUALITY AT NATICK RDE CENTER*

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FACILITIES WITH HIGHEST QUALITY RATINGS*

BOSS	5.00
Swimming Pool	3.95
Athletic Fields	3.78
Post Picnic Area	3.68
Recreation/Community Activity Ctr.	
3.45	

FACILITIES WITH LOWEST QUALITY RATINGS*

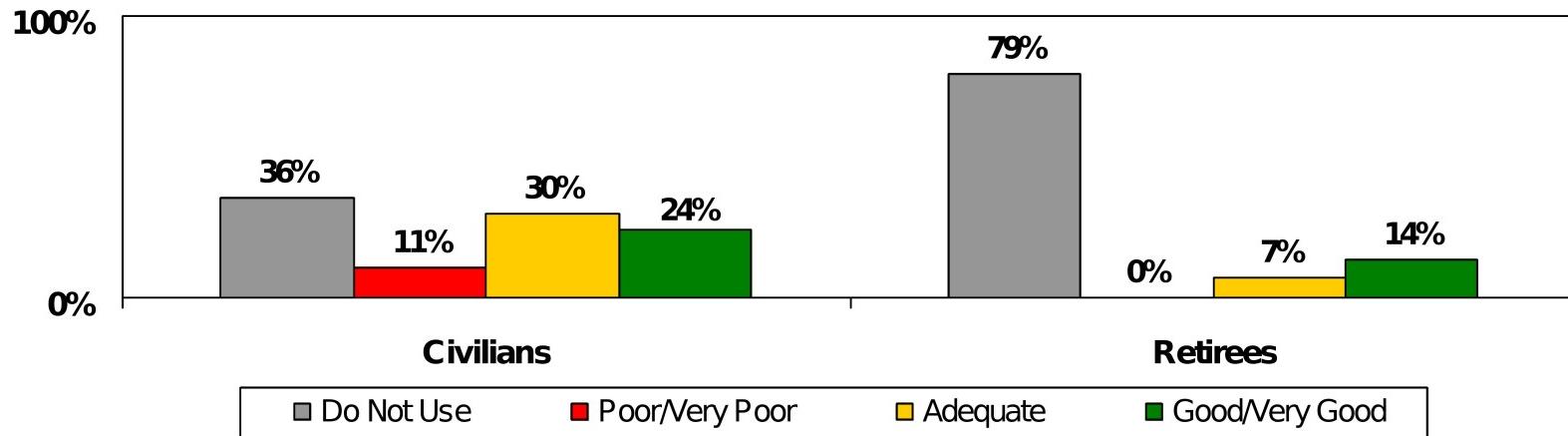
Recreation/Community Activity Ctr.	
3.45	
Post Picnic Area	3.68
Athletic Fields	3.78
Swimming Pool	3.95
BOSS	5.00

*Programs and facilities were rated on a 5 point scale: 5 = Very Good and 1 = Very Poor. These ratings are an average of three quality scores: Building/Facility/Space, Equipment/Furnishings, and Personnel.

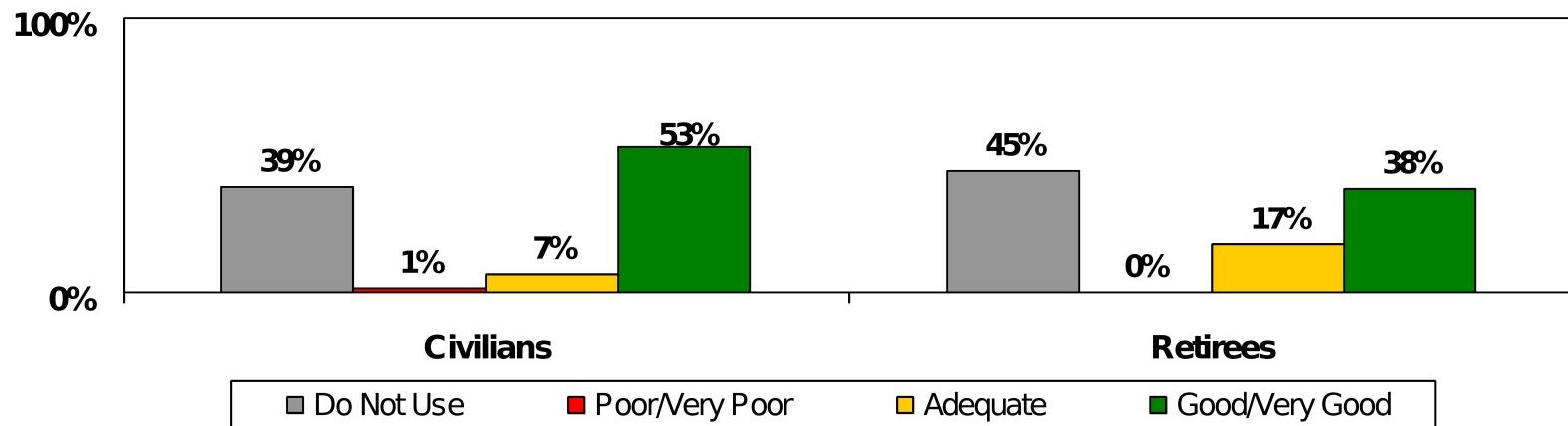
MWR PROGRAMS & FACILITIES: FOOD AND BEVERAGE SERVICES QUALITY

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Quality of On-Post Services



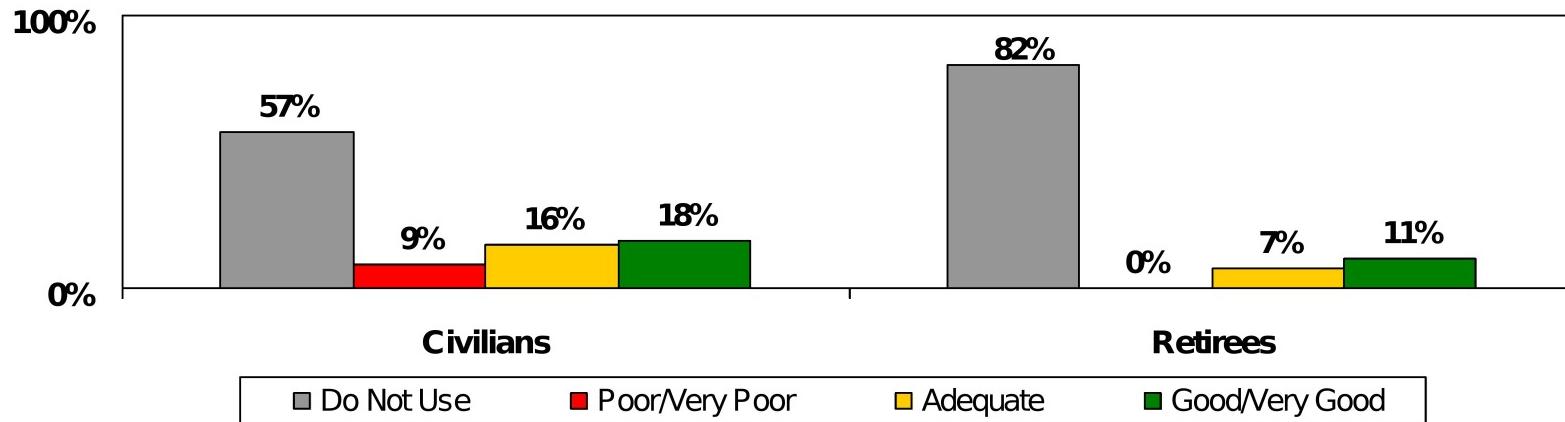
Quality of Off-Post Services



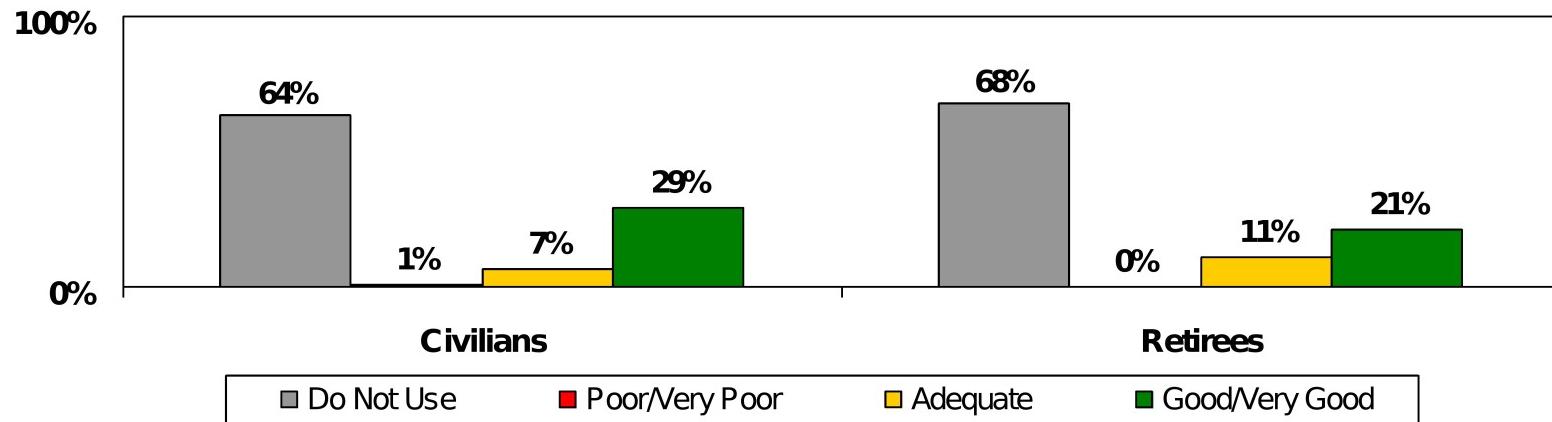
MWR PROGRAMS & FACILITIES: CATERING SERVICES QUALITY

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Quality of On-Post Services



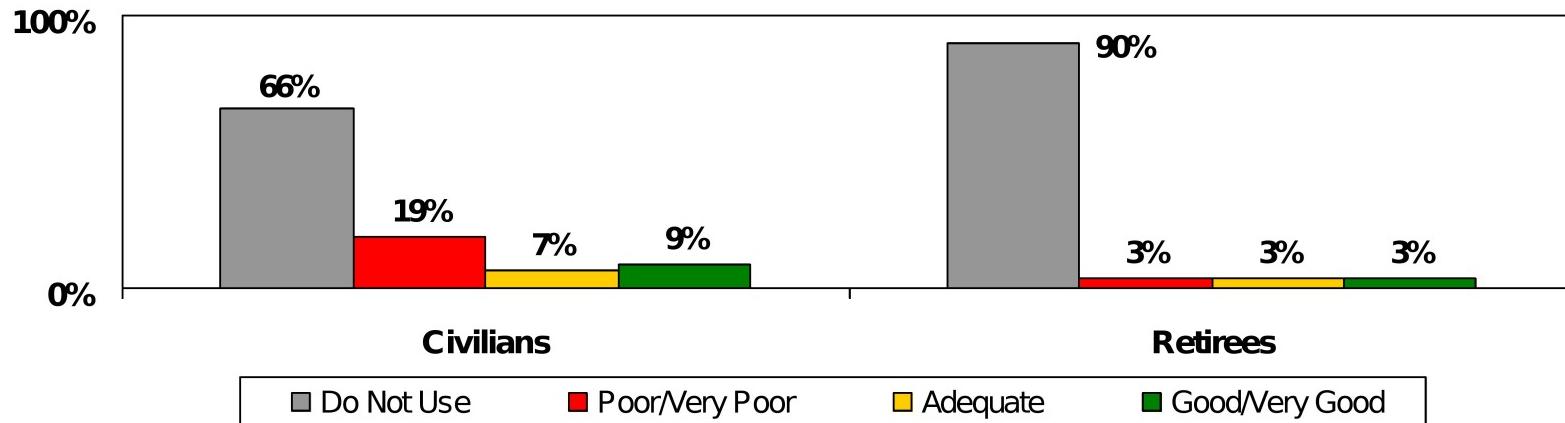
Quality of Off-Post Services



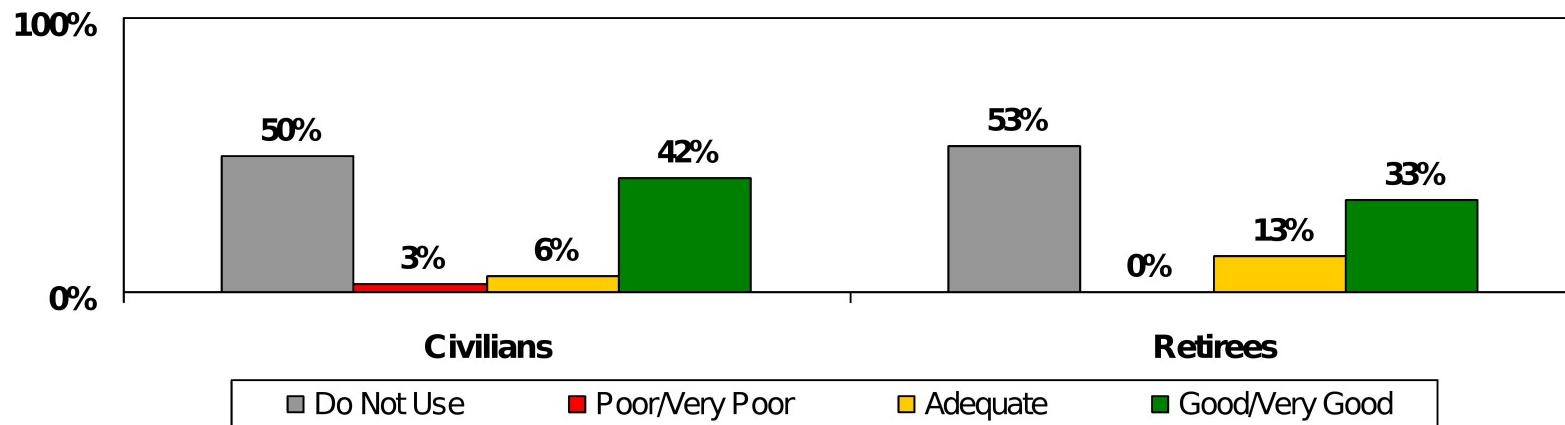
MWR PROGRAMS & FACILITIES: ENTERTAINMENT SERVICES QUALITY

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Quality of On-Post Services

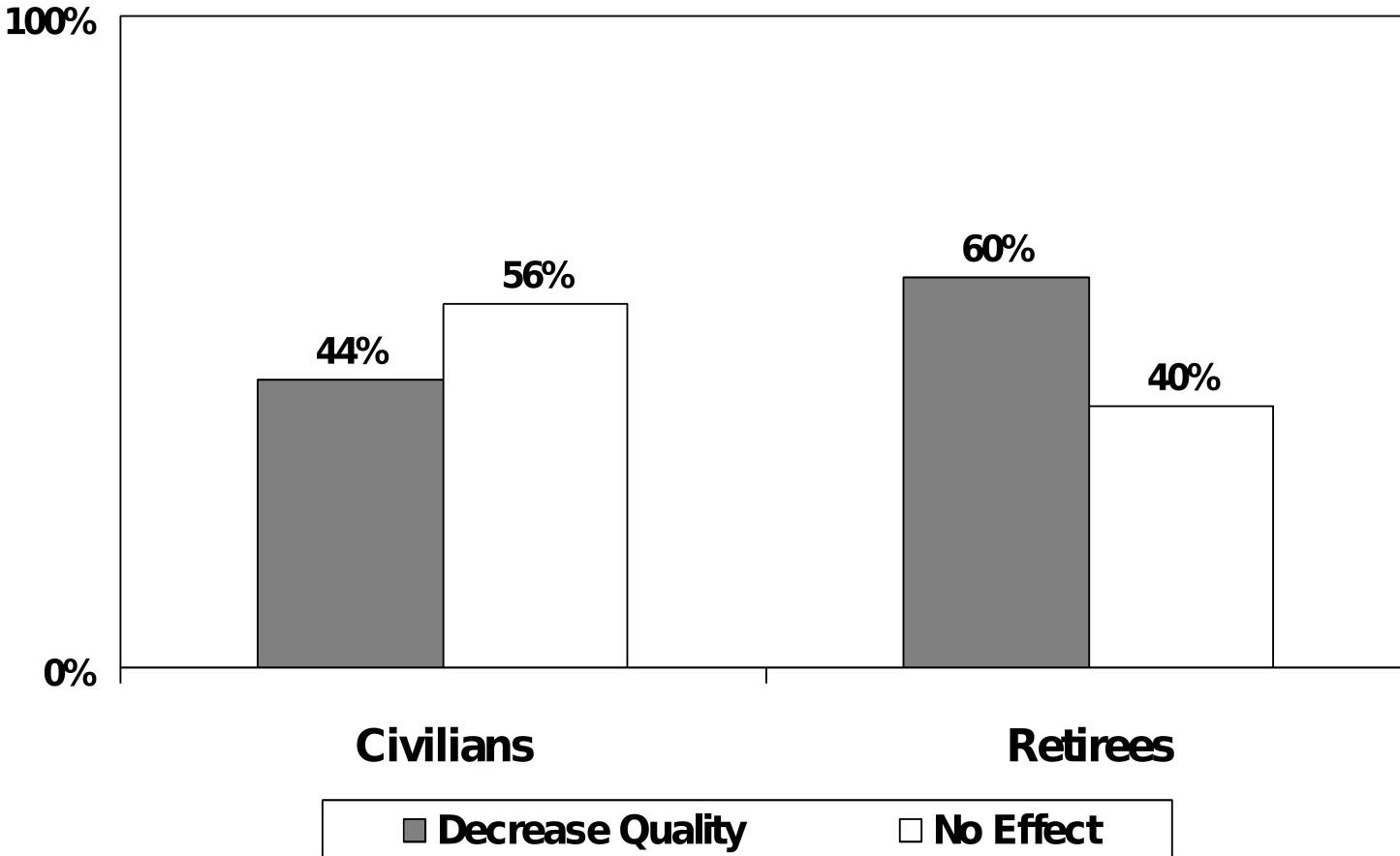


Quality of Off-Post Services



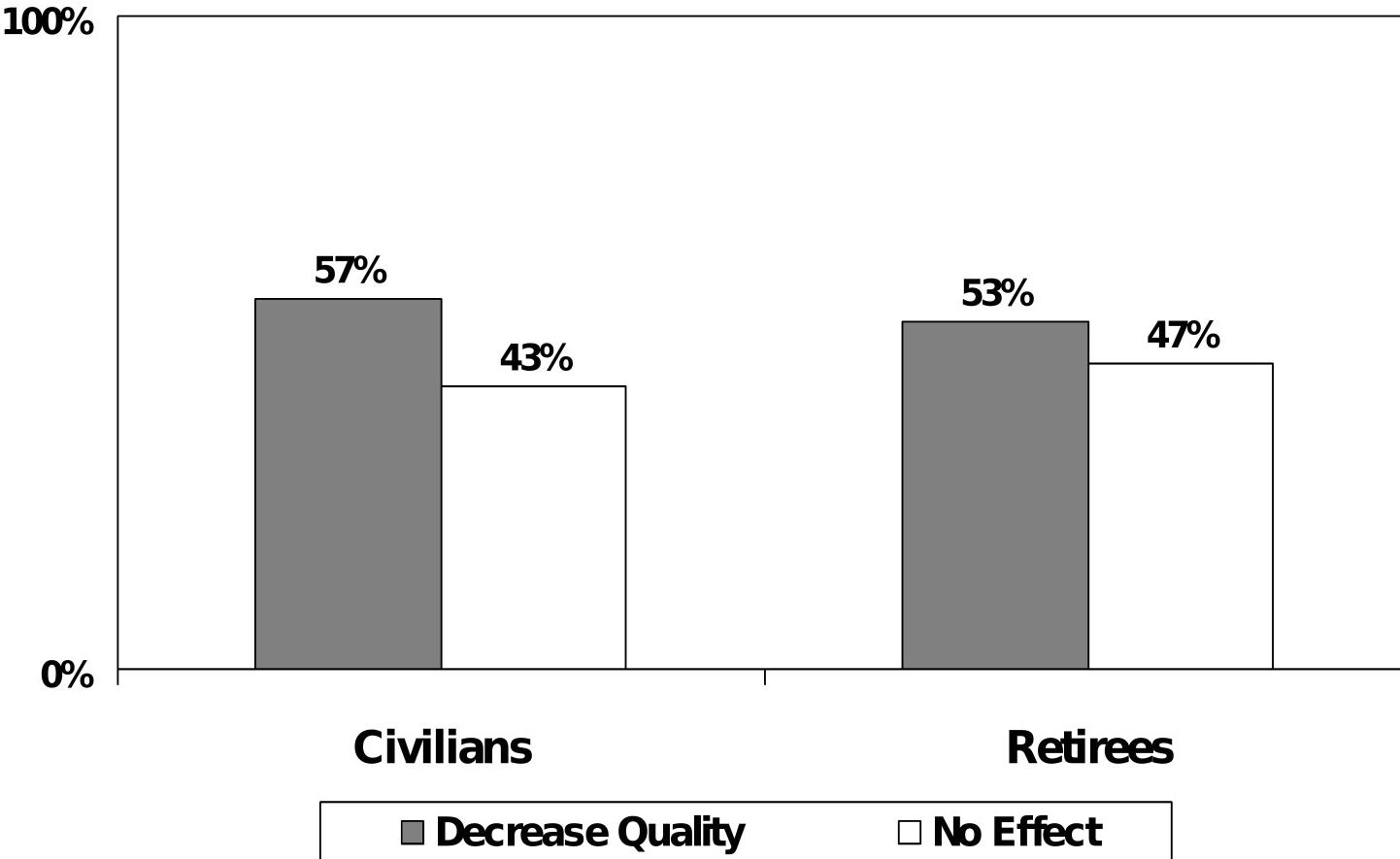
MWR PROGRAMS & FACILITIES: CLUB PROGRAM ELIMINATION EFFECT ON ARMY QOL

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MWR PROGRAMS & FACILITIES: RECREATION PROGRAM ELIMINATION EFFECT ON ARMY QOL

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MWR PROGRAMS & SERVICES: MOST AND LEAST IMPORTANT ACTIVITIES/PROGRAMS

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Top 7 Activities/Programs

Fitness Center/Gymnasium	81%
Athletic Fields	53%
Swimming Pool	49%
Child Development Center	48%
Library	47%
Post Picnic Area	46%
Recreation/Community Activity Center	44%

Respondents were asked to select the 7 most important and 7 least important activities and programs offered on an Army installation.

RV Park	72%
Golf Course Pro Shop	65%
Bowling Pro Shop	60%
Car Wash	58%
Golf Course Food & Beverage	53%
Arts & Crafts Center	48%
Cabins & Campgrounds	45%

Bottom 7 Activities/Programs

MWR PROGRAMS & SERVICES: SOURCES OF INFORMATION*

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WHERE DO YOU GET INFORMATION?	CIVILIANS	RETIREES	TOTAL
Internet	18%	13%	15%
E-mail	70%	16%	59%
Friends and neighbors	20%	16%	17%
Family Readiness Groups (FRGs)	0%	0%	2%
Bulletin boards on post	28%	9%	25%
Post newspaper	10%	9%	11%
MWR publications	5%	13%	5%
Radio	1%	0%	0%
Television	1%	0%	1%
My child(ren) let(s) me know	1%	0%	1%
Other unit members or co-workers	20%	9%	17%
Unit or post commander or supervisor	3%	0%	3%
Marquees/billboards	6%	0%	7%
Flyers	20%	19%	20%
Other	13%	28%	13%
I never hear anything	5%	34%	16%

*The top 3 sources of MWR information are shaded for each patron group and the total population.

LEISURE ACTIVITIES: PREFERENCES OVERALL AND BY PATRON GROUP

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Top 10 Leisure Activities for All Respondents

Watching TV, videotapes, and DVDs	82%
Going to movie theaters	81%
Entertaining guests at home	78%
Internet access/applications (home)	68%
Live entertainment	68%
Cardiovascular equipment	65%
Walking	64%
Plays/shows/concerts	63%
Special family events	60%
Going to beaches/lakes	60%

Top 5 for Civilians

Watching TV, videotapes, and DVDs	81%
Entertaining guests at home	77%
Going to movie theaters	72%
Internet access/applications (home)	69%
Festivals/events	66%

Top 5 for Retirees

Walking	91%
Entertaining guests at home	86%
Watching TV, videotapes, and DVDs	77%
Card/table games	67%
Going to movie theaters	67%

LEISURE ACTIVITIES: PREFERENCES BY ACTIVITY CATEGORY

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Team Sports

Softball	16%
Basketball	9%
Self-directed sports tournaments	6%
Soccer	5%
Volleyball	5%

Sports and Fitness

Cardiovascular equipment	65%
Walking	64%
Weight/strength training	50%
Group exercise classes	37%
Running/jogging	35%

Outdoor Recreation

Going to beaches/lakes	60%
Picnicking	49%
Camping/hiking/backpacking	38%
Bicycle riding/mountain biking	35%
Canoeing/kayaking/rafting	21%

Entertainment

Watching TV, videotapes, and DVDs	82%
Going to movie theaters	81%
Live entertainment	68%
Plays/shows/concerts	63%
Attending sports events	57%

Social

Entertaining guests at home	78%
Special family events	60%
Night clubs/lounges	44%
Dancing	42%
Happy hour/social hour	41%

Special Interests

Internet access/applications (home)	68%
Gardening	53%
Digital photography	41%
Computer games	28%
Trips/touring	25%

LEISURE ACTIVITIES: MARKET SHARE OF ACTIVITY PREFERENCES ON POST*

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ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	OVERALL PARTICIPATION
Reference/research services	29%	N/A	29%
Reading	25%	N/A	25%
Internet access (library)	25%	N/A	25%
Study/self development	18%	N/A	18%
Softball	12%	3%	16%
Multi-media (videos, DVDs, CDs)	12%	N/A	12%
Lap swimming	9%	10%	19%

*Top 7 leisure activity preferences ranked by on-post participation.

LEISURE ACTIVITIES: MARKET SHARE OF SPECIAL INTEREST ACTIVITY PREFERENCES BY LOCATION*

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ACTMTIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	PARTICIPATED PRIMARILY AT HOME	OVERALL PARTICIPATION
Internet access/applications (home)	4%	6%	58%	68%
Gardening	0%	3%	50%	53%
Digital photography	2%	13%	26%	41%
Computer games	1%	2%	25%	28%
Trips/touring	0%	25%	0%	25%
Automotive maintenance & repair	3%	6%	13%	23%
Auto detailing/washing	0%	7%	13%	20%

*Top 7 special interest activity preferences ranked by overall participation.

NEXT STEPS

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□ **INSTALLATION REPORTS**

- Review information on 91 leisure activities and up to 40 MWR facilities
- Share with Commander and program managers

□ **DATA APPLICATIONS**

- Action planning for program change and enhancement
- Strategic business planning
- Five year program planning
- Priorities for Project Validation Assessments
- Follow-up focus groups on items of interest or for clarification of findings
- Input into the Installation Status Report (ISR)